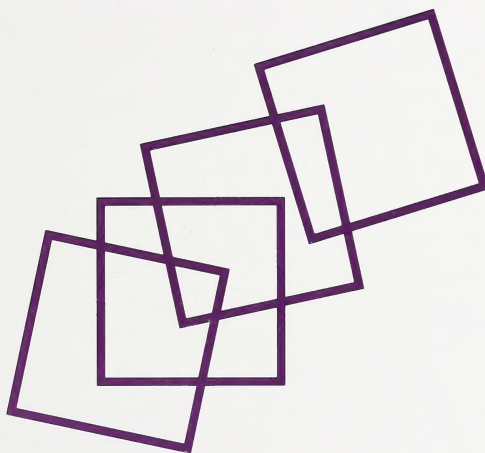


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# TOURISM SERVICES



## TOURISM STANDARDS


W E S T E R N  
C A N A D A

### TOUR DIRECTOR

### OCCUPATIONAL STANDARDS

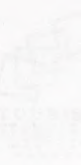


*Excellence Pays* ★ ★ ★  
Alberta Tourism Education Council ★ ★



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## INTRODUCTION

The largest industry in the world is tourism, employing one in every ten people. It is Alberta's third largest industry, generating billions of dollars of revenue each year and creating an estimated 100,000 full-time and part-time jobs. By the year 2000, tourism has the potential to provide 220,000 jobs for Alberta. The industry's rapid growth and the potential it holds for the province's economy.

Tourism involves the participation of individuals, businesses, organizations, and governmental institutions, all of which play an integral part in providing services and products to visitors to ensure a pleasant and satisfying experience.

The tourism industry is multi-dimensional and encompasses eight sectors:

- 1) Accommodation
- 2) Air and Ground Transportation
- 3) Attractions
- 4) Events and Conferences
- 5) Food and Beverage
- 6) Information
- 7) Retail
- 8) Travel

## OCCUPATIONAL STANDARDS

## FOR

# TOUR DIRECTOR

Alberta Tourism Education Council  
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## ▼ INTRODUCTION

The largest industry in the world is tourism, employing one in every fourteen people. It is Alberta's third largest industry, generating billions of dollars of revenue every year and creating an estimated 100,000 full-time, part-time and seasonal jobs. By the year 2000, tourism has the potential to provide 220,000 jobs for Albertans. The diversity and rapid growth of this industry will have a tremendous impact on the entire economy.

Tourism involves the participation of area residents, businesses, agencies and educational institutions, all of whom play an integral part in providing services and products to visitors to ensure a pleasant and satisfying experience.

The tourism industry is multi-dimensional and encompasses eight sectors:

- |                                     |                      |
|-------------------------------------|----------------------|
| 1) Accommodation                    | 5) Food and Beverage |
| 2) Adventure Tourism and Recreation | 6) Tourism Services  |
| 3) Attractions                      | 7) Transportation    |
| 4) Events and Conferences           | 8) Travel Trade      |

Tour directors are an essential part of the travel trade sector and are therefore part of the success of the industry in general. Professional tour directors have the opportunity to make a positive impact not only within their own specific profession, but also on the tourism industry and economy as a whole.

The Alberta Tourism Education Council (ATEC) exists to create a quality tourism experience by ensuring that the present and future education and training needs of Alberta's tourism industry are met. To achieve this, ATEC, along with the Manitoba Tourism Education Council, the Saskatchewan Tourism Education Council and the Pacific Rim Institute of Tourism, is involved in a project called the Tourism Standards Consortium (TSC). The mandate of TSC is to co-operatively develop standards and certification for the tourism industry of western Canada. Over the three years of the project, the TSC will develop new standards as well as revise and validate existing standards. In addition, standards-based certification will be developed as requested by industry.

If you would like more information on how you can benefit from these standards, please contact:

Alberta Tourism Education Council  
12th Floor, Sterling Place  
9940 - 106 Street  
Edmonton, Alberta, T5K 2N2  
Phone: (403) 422-0781  
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# STANDARDS OVERVIEW

## WHAT ARE STANDARDS?

Standards are statements outlining the knowledge and performance required of an individual to be considered competent in an occupation. By learning and mastering the content of these standards, your knowledge and performance will meet industry expectations.

## WHY DEFINE STANDARDS?

Central to the mandate of the Tourism Standards Consortium is the enhancement of the image of hospitality within both the industry and the general public. Defining standards is one way to help increase understanding of the broad range of skills required of those working within this industry.

## HOW ARE STANDARDS DEVELOPED?

These standards were developed by industry professionals across Canada's four western provinces. These individuals volunteered their time and expertise to provide a complete description of the skills, attitudes and knowledge required for this occupation. Each province had two committees consisting of individuals working in the industry: an initial committee which met to determine the content of the standards, as well as a larger committee which, after receiving the draft version of the standards, commented on the content by mail. All comments were addressed at a second meeting of the original committee and once the content was agreed upon, this final version was printed.

## WHO BENEFITS FROM STANDARDS?

Eventually, all will benefit from the monitoring of performance in relation to industry standards. As standards gain recognition, industry professionals will be able to increase their skills and knowledge and be recognized for their abilities. This will benefit local and visiting consumers and increase satisfaction within the hospitality and tourism industries.

Specific groups who can benefit from standards are:

### Industry Professionals

- standards help identify career paths
- standards enhance public and professional image
- standards provide a basis for challenge, self-improvement and advancement
- standards provide the basis for certification, based upon competent performance

### Employers and Owners

- standards define areas where employees must be proficient, which assists in recruiting, training and development of staff
- standards will provide employers and owners with a highly trained work-force, which can increase productivity and decrease costs incurred by high staff turnover, translating into an improved bottom line

### Educators

- standards provide the basis for curriculum and program development
- standards identify areas where educational expertise is needed and applicable

### Students

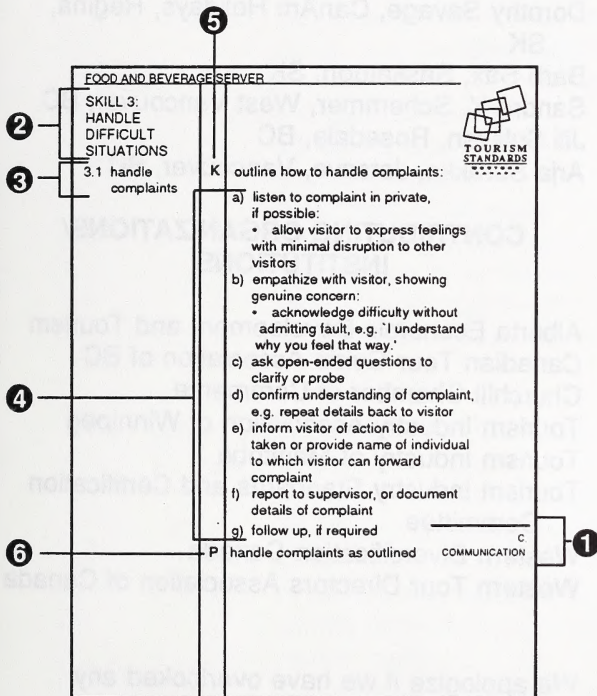
- standards form the basis of curriculum in tourism programs and facilitate training to accepted industry levels
- standards help to promote the tourism industry as a viable and fulfilling career choice
- standards clarify career options within the tourism industry



## HOW ARE STANDARDS READ?

Below is a description of the parts of the standards:

- 1 **Major Category** - identifies a general type of activity within the occupation.
- 2 **Skill** - identifies a general skill area within the major category.
- 3 **Sub-skill** - identifies a specific activity within the general skill.
- 4 **Details of a Standard** - outline how the subskill can be achieved.  
The details of the standard are divided into one or two parts:
- 5 Knowledge (K) which indicates the details of the standard which must be known to meet the sub-skill.
- 6 Performance (P) which indicates that the details of a standard must be performed.



For example, in the above diagram, the sub-skill statement, *handle complaints*, is followed by a Knowledge statement (identified by the K) that reads *outline how to handle complaints*. This means that you must KNOW the content which follows in order to meet the sub-skill. At the end of the standard, the Performance statement (identified by the P), *handle complaints as outlined*, indicates the content of this standard must be PERFORMED.

## HOW ARE STANDARDS USED?

**Firstly**, read each standard and determine:

- how it compares with your knowledge or the way you currently perform a skill
- areas where you need improvement.

**Then**, use a highlighter pen and mark the skills you want to learn and practice.

**Next**, study the knowledge skills (K) and practice the performance skills (P) in the standards:

- ask your supervisor for assistance, if possible
- arrange study groups with peers
- obtain other material to support the standards, e.g. books, video

**Finally**, check off the skills as you master them.

## HOW DO STANDARDS RELATE TO CERTIFICATION?

If industry representatives want a system of professional recognition for their occupation, a certification process is developed with their input.

The standards are used as the basis for the development of the certification tools. The certification process is made up of three steps.

Successful completion of a written examination and of a performance review allows the candidate to proceed to the final step, a performance evaluation conducted by a trained industry evaluator. Upon successful completion of the three steps, the industry professional receives a certificate and a pin in recognition of this achievement.

## HOW DOES HOUSE POLICY RELATE TO STANDARDS?

The Tourism Standards Consortium recognizes that an establishment may have internal policies that affect the way in which a skill is performed. The standards provide a general base of information upon which your house policies may be built. The knowledge portion of the standards should still be learned, as it is the typical generic policy with which the professional should be familiar in order to challenge the written examination. By learning or demonstrating an accepted generic standard, the certified professional gains the advantage of greater job mobility, as well as an appreciation of other ways of accomplishing tasks.

House policy does not replace the generic standard; rather, it allows the evaluator to determine if performance is to the standard or follows a particular house policy. The evaluator will not fail candidates for following policies of their establishments.



# ACKNOWLEDGEMENTS

The Tourism Standards Consortium would like to recognize the following individuals and organizations for their expertise, time and energy without which the development of these standards would not have been possible.

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 Tourism Industry Standards and Certification Committee  
 Western Diversification Canada  
 Western Tour Directors Association of Canada

We apologize if we have overlooked any contributors to this project. Please let us know if you are aware of any omissions.



## ▼ DEFINITION

A Tour Director accompanies and assists passengers on multi-day tours, manages arrangements and services, and provides relevant information and commentary.

A Tour Director may also be known as a:

- long distance tour director
- tour manager
- tour escort
- courier

# ▼ TABLE OF CONTENTS

Introduction

Standards Overview

Acknowledgements

Definition

## A. PROFESSIONALISM

- |  |   |
|--|---|
| 1. Be Professional                                     | 3 |
| 1.1 exhibit professionalism                            |   |
| 1.2 handle upgrades, comps and commissions             |   |
| 1.3 maintain positive working relationship with driver |   |
| 1.4 co-operate with leader of pre-formed group         |   |
| 1.5 participate in professional development            |   |

## B. KNOWLEDGE

- |  |    |
|--|----|
| 1. Describe Tourism Industry                                   | 9  |
| 1.1 list the eight sectors of tourism                          |    |
| 1.2 define importance of tourism                               |    |
| 1.3 define importance of responsible tourism                   |    |
| 1.4 outline guidelines for responsible tourism                 |    |
| 2. Identify General Knowledge                                  | 12 |
| 2.1 maintain fact file   |    |
| 2.2 identify types of information that may be helpful for tour |    |

## C. COMMUNICATION

- |   |    |
|---|----|
| 1. Communicate Effectively  | 15 |
| 1.1 communicate clearly   |    |
| 1.2 be a good listener  |    |
| 2. Prepare and Deliver Commentary                                 | 16 |
| 2.1 develop commentary  |    |
| 2.2 identify importance of tailoring commentary to passengers     |    |
| 2.3 tailor commentary to passengers                               |    |
| 2.4 outline importance of using public address system effectively |    |
| 2.5 use communication systems                                     |    |
| 2.6 deliver commentary  |    |



## D. PROCEDURES

- |  |    |
|--|----|
| 1. Prepare for Tour  | 23 |
| 1.1 prepare for tour                                       |    |
| 2. Conduct Tour  | 26 |
| 2.1 meet ground passengers                                 |    |
| 2.2 meet incoming airline passengers                       |    |
| 2.3 transfer passengers to hotel                           |    |
| 2.4 check in at hotel                                      |    |
| 2.5 check out of hotel                                     |    |
| 2.6 conduct first-day tour briefing                        |    |
| 2.7 conduct site briefing                                  |    |
| 2.8 follow guidelines for day-to-day tour management       |    |
| 2.9 sell optionals   |    |
| 2.10 reconfirm reservations                                |    |
| 2.11 follow last day procedures                            |    |
| 2.12 handle international border crossings                 |    |
| 2.13 check in at transportation terminals                  |    |
| 3. Manage Details of Tour                                  | 42 |
| 3.1 adhere to itinerary                                    |    |
| 3.2 use seat rotation                                      |    |
| 3.3 keep track of baggage                                  |    |
| 3.4 keep track of passengers                               |    |
| 3.5 describe importance of welcome and farewell gatherings |    |
| 3.6 recognize special days or events                       |    |
| 3.7 follow cash control and reporting procedures           |    |

## E. DIFFICULT SITUATIONS

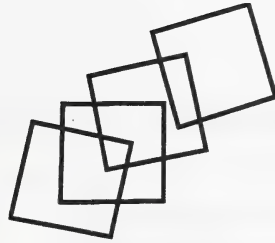
- |  |    |
|--|----|
| 1. Manage Difficult Situations               | 48 |
| 1.1 follow safety and security guidelines    |    |
| 1.2 respond to passengers with special needs |    |
| 1.3 solve problems                           |    |
| 1.4 locate missing passenger                 |    |
| 1.5 handle disruptive passenger              |    |
| 1.6 handle bumping                           |    |
| 1.7 handle complaints                        |    |
| 1.8 assist passenger in locating lost items  |    |
| 1.9 assist sick or injured passenger         |    |
| 1.10 handle death of passenger               |    |

## GLOSSARY

59







**TOURISM  
STANDARDS**

**W E S T E R N  
C A N A D A**

# **TOUR DIRECTOR STANDARDS**





SKILL 1:  
BE  
PROFESSIONAL

 1.1 exhibit  
professionalism

**K** outline how to exhibit professionalism:

## a) be:

- an ambassador, e.g. speak positively about area, country and tour operator
- a leader, e.g. make decisions, do not put decisions to group vote
- a mediator, e.g. settle disputes without embarrassing passengers
- a team member, e.g. maintain rapport with driver, industry partners and other tour directors
- accountable, e.g. take responsibility for actions
- adaptable, e.g. be willing to incorporate suggestions from passengers
- calm, e.g. remain composed in stressful situations
- considerate, e.g. recognize passengers' limitations and feelings
- creative, e.g. play games, share stories, add variety to tour
- credible, e.g. be honest, give accurate facts
- detail oriented, e.g. ensure accuracy of itinerary, routing and reservations
- empathetic, e.g. listen to and acknowledge concerns of passengers
- enthusiastic, e.g. enjoy job
- ethical, e.g. book services on basis of merit, not personal gain
- firm, e.g. ensure passengers adhere to established guidelines
- innovative, e.g. try new activities, where appropriate
- knowledgeable, e.g. read local newspapers, watch daily news, update information en route
- organized, e.g. ensure paperwork is in order and easily accessible

---

 A.  
PROFESSIONALISM

## TOUR DIRECTOR

### SKILL 1: BE PROFESSIONAL

#### 1.1 cont'd

- patient, e.g. take time to accommodate special needs
  - prepared, e.g. research destinations before embarking on tour
  - punctual, e.g. arrive at meeting place before group
  - reliable, e.g. fulfil obligations
  - tactful, e.g. handle disputes and complaints without offending anyone
  - timely, e.g. notify passengers ahead of time as to what to expect
  - tolerant, e.g. recognize that standards vary among countries, maintain reasonable expectations
  - trustworthy, e.g. account for all expenditures made on behalf of tour operator
- b) show interest in people, e.g. listen to stories, encourage small talk
- c) maintain:
- friendly, helpful and approachable attitude throughout tour
  - sense of humour, e.g. be able to laugh at yourself
  - good health, e.g. rest, exercise, eat properly
  - rapport with industry contacts, employers and suppliers
  - personal grooming
- d) represent company in professional manner:
- speak well of company operating tour

#### A. PROFESSIONALISM



SKILL 1:  
BE  
PROFESSIONAL

1.1 cont'd

- do not compare company, products, services or prices to others
- discuss problems with company management, not with passengers
- dress professionally:
  - make yourself apparent to group, e.g. wear uniform, distinguishable clothing and/or name tag
- follow guidelines for alcohol use, for example:
  - follow company policy
  - use alcohol in moderation
  - follow customs of local area or country
- e) maintain neutral position during discussions:
  - avoid expressing personal opinions about controversial subjects
  - never make offensive jokes, e.g. about religion, race, gender, politics or occupations
- f) treat all passengers equally:
  - do not let requests from one passenger affect the quality of service provided to others

**P** exhibit professionalism as outlined

A.  
PROFESSIONALISM

1.2 handle upgrades, comps and commissions

**K** outline how to handle upgrades, comps and commissions:

- a) accept upgrades, comps and commissions discreetly:
  - ensure acceptance does not negatively impact passengers' impression of tour, e.g. accepting airline and hotel upgrades may create jealousy among passengers
  - ensure acceptance does not contradict company policy

## TOUR DIRECTOR

### SKILL 1: BE PROFESSIONAL

#### 1.2 cont'd

- b) be willing to accept downgrade or trade hotel accommodation to ensure passengers have suitable accommodation

**P** handle upgrades, comps and commissions as outlined

#### 1.3 maintain positive working relationship with driver

**K** outline how to maintain positive working relationship with driver:

- a) meet with driver before arrival of passengers to establish rapport
- b) determine extent of driver's knowledge, for example:
  - confirm itinerary and routing
  - ask about abilities related to tour, e.g. first aid, emergency procedures
- c) clarify roles and responsibilities of driver, for example:
  - helping passengers from coach
  - routing
  - cleaning of coach
  - loading and unloading baggage
  - counting baggage
- d) establish guidelines in advance, e.g. departure procedures, timing of itinerary, delivering commentary, driver's meals and accommodation
- e) clarify role of tour director in controlling itinerary, e.g. driver must get approval for changes in itinerary and routing
- f) introduce driver to passengers
- g) work co-operatively with driver, e.g. discuss contingency plans that may be required

### A. PROFESSIONALISM

SKILL 1:  
BE  
PROFESSIONAL

1.3 cont'd

- h) treat driver with respect,  
e.g. acknowledge contributions to  
success of tour
- i) communicate clearly with driver
- j) discuss issues and problems in private
- k) spend time with driver, when possible,  
e.g. at meal stops

**P** maintain positive working relationship with  
driver as outlined

1.4 co-operate with  
leader of pre-formed  
group

**K** outline how to co-operate with leader of  
pre-formed group:

- a) follow company policy for working with  
group leader
- b) prior to departure, discuss with group  
leader:
  - tour plans
  - which duties each should manage,  
e.g. safety, tour procedures,  
itinerary, finance
  - that tour director retains leadership  
of tour
- c) acknowledge preliminary work that  
leader has done

**P** co-operate with leader of pre-formed group  
as outlined

1.5 participate in  
professional  
development

**K** outline how to participate in professional  
development:

- a) identify personal strengths, weaknesses  
and interests:
  - review comment cards for  
suggestions

A.  
PROFESSIONALISM



## TOUR DIRECTOR

### SKILL 1: BE PROFESSIONAL

1.5 cont'd

- b) improve or acquire skills and knowledge, for example:
- develop research skills
  - identify sources of information
  - read books and journals, e.g. about local information, flora and fauna, history or geography
  - take courses, e.g. public speaking, languages, geography, history, first aid, Cardiopulmonary Resuscitation (CPR)
  - network, e.g. share information with others in industry
  - experience tourism services and products first hand, e.g. travel to new destinations, try new hotels and restaurants

**P** participate in professional development as outlined

---

A.  
PROFESSIONALISM

SKILL 1:  
DESCRIBE TOURISM  
INDUSTRY

1.1	list the eight sectors of tourism	K	list the eight sectors of tourism:  a) accommodation, e.g. hotels, bed and breakfasts b) food and beverage, e.g. restaurants, pubs c) adventure/recreation, e.g. ski resorts, hiking d) transportation, e.g. motor coaches, airlines, rail, cruises, ferries e) events/conferences, e.g. festivals, trade shows, local fairs f) attractions, e.g. museums, parks, historic sites, amusement parks g) travel trade, e.g. tour operators, travel agencies, tour directors h) tourism services, e.g. information centres, retail sales, banking, travel media
1.2	define importance of tourism	K	define importance of tourism:  a) creates employment b) generates revenue c) stimulates local development, e.g. creates and improves attractions, events, services and facilities d) encourages cross-cultural awareness and understanding e) encourages promotion, conservation and appreciation of resources, e.g. heritage, history, environment f) instills pride in community, area and country
1.3	define importance of responsible tourism	K	define importance of responsible tourism:  protects and preserves ecology and culture of area

B.  
KNOWLEDGE

## TOUR DIRECTOR

### SKILL 1: DESCRIBE TOURISM INDUSTRY

1.4 outline guidelines for responsible tourism

**K** outline guidelines for responsible tourism:

- a) be aware of customs, manners, cultures and environmental issues of area
- b) protect environment:
  - do not:
    - remove articles from natural or historic sites, e.g. wildflowers, artifacts, fossils
    - litter
    - feed wildlife, e.g. birds, animals
  - practice:
    - low-impact land use, e.g. camp in established campgrounds, walk on existing trails
    - conservation methods, e.g. reduce, reuse, recycle, refuse
    - the principle: 'take only pictures, leave only footprints'
  - use environmentally friendly methods of transportation when possible
- c) encourage promotion and use of indigenous products
- d) do not buy products made from endangered plants, animals or fossils, e.g. ivory, feathers, whale bone, dinosaur bone
- e) respect customs, manners and cultures of area
- f) respect privacy and property of others, for example:
  - ask before taking pictures of indigenous people

B.  
KNOWLEDGE



SKILL 1:  
DESCRIBE TOURISM  
INDUSTRY

1.4 cont'd

- do not take pictures:
  - on restricted sites, e.g. military sites, border crossings
  - in prohibited areas, e.g. museums, galleries
- ask permission before entering private property

---

B.  
KNOWLEDGE

## TOUR DIRECTOR

### SKILL 2: IDENTIFY GENERAL KNOWLEDGE

2.1 maintain fact file

**K** outline how to maintain fact file:

- a) identify types of information that may be required, e.g. local history, maps, current affairs, contact names and numbers
- b) collect information
- c) verify information
- d) file information in easily accessible format, e.g. according to destination and tour type
- e) share information with other tour directors
- f) keep information current

**P** maintain fact file as outlined

2.2 identify types of information that may be helpful for tour

**K** identify types of information that may be helpful for tour:

- a) location, hours of operation, access and applicable costs of community services, events and attractions, for example:
  - shopping malls
  - churches
  - banks and banking machines
  - foreign exchange outlets
  - liquor stores
  - restaurants
  - entertainment facilities
  - recreation facilities
  - transportation services
  - post offices
  - motor coach service stations
  - self serve laundry and dry cleaners
  - tourism information booths

---

B.  
KNOWLEDGE

SKILL 2:  
IDENTIFY GENERAL  
KNOWLEDGE

## 2.2 cont'd

- medical services, e.g. doctors, drugstores, optometrists, emergency clinics
- b) regional natural environment, for example:
  - flora and fauna
  - geology, e.g. rock formations
  - waterways, e.g. tides, dams
  - topography, e.g. prairies, mountains, glacial terrain, elevation
  - geographic location, e.g. 49th parallel, Continental Divide
  - weather conditions and climate
- c) regional economic and social environment, for example:
  - government structure, e.g. type of government, number of parties in system
  - housing costs, e.g. rental and purchase price ranges, mortgage rates
  - cost of living
  - taxes, e.g. sales, service, property
  - health care and education systems
  - national, regional and municipal populations
  - industry and economy
  - social structure
  - religion
  - cultural influences, e.g. aboriginal population, ethnic population
- d) local information, for example:
  - lotteries
  - postage rates
  - systems of measurement and conversion:
    - temperatures, e.g. Celsius/Fahrenheit
    - fuel prices, e.g. litres/gallons
    - distances, e.g. kilometres/miles

---

 B.  
KNOWLEDGE



## SKILL 2: IDENTIFY GENERAL KNOWLEDGE

### 2.2 cont'd

- legislation, e.g. liquor, traffic, customs and immigration
- architecture, e.g. buildings, bridges
- mythology, legends and folklore
- history
- quality of drinking water
- for overseas passengers and passengers travelling internationally:
  - currency exchange rates
  - etiquette, e.g. greeting, eye contact, cultural perceptions of time
  - telephone procedures:
    - ▲ calling card procedures
    - ▲ least expensive way to call, e.g. through post office, pay telephones
    - ▲ how to contact multilingual international operator
  - electrical current and adapters required
  - plumbing, e.g. shower and toilet operation
  - water and electrical restrictions
  - location of consulate offices
  - passport/visa requirements, e.g. for hotels, immigration

---

## B. KNOWLEDGE

SKILL 1:  
COMMUNICATE  
EFFECTIVELY

1.1 communicate clearly

**K**

outline how to communicate clearly:

- a) speak clearly:
  - use correct pronunciation
- b) project voice so that all passengers can hear
- c) be concise
- d) stay on topic
- e) vary tone, volume and pace to:
  - emphasize points, e.g. use pauses
  - evoke emotion, e.g. build suspense or excitement
  - maintain interest, e.g. avoid lecturing
- f) speak at level appropriate to group, e.g. use simpler vocabulary for children
- g) ensure message is understood:
  - repeat message, if necessary
- h) maintain eye contact within the group
- i) ensure verbal and non-verbal messages match

**P**

communicate clearly as outlined

1.2 be a good listener

**K**

outline how to be a good listener:

- a) be approachable
- b) focus on details of what is being said and on what is being implied
- c) allow speaker to finish message:
  - do not interrupt
- d) show interest in what is being said, e.g. nod, smile, make eye contact
- e) be sincere with acknowledgements and gestures
- f) confirm understanding, e.g. paraphrase

**P**

be a good listener as outlined

C.  
COMMUNICATION

## TOUR DIRECTOR

### SKILL 2: PREPARE AND DELIVER COMMENTARY

2.1 develop commentary

**K** outline how to develop commentary:

a) determine:

- tour profile, e.g. historic, recreation, gambling, shopping, study
- tour destinations, e.g. sites, cities
- route

b) research material for tour, for example:

- network, e.g. with co-workers, industry contacts, individuals who have experienced destination first-hand
- read:
  - fact file
  - periodicals
  - books, e.g. travel guides
- listen to news broadcasts to determine current events of destination area
- watch videos
- obtain literature from tourism authorities, e.g. chambers of commerce, tourism departments

c) verify information, e.g. call appropriate authority to confirm accuracy of details

d) create outline of commentary considering tour profile and timing:

- use tour theme as basis for commentary, e.g. Canadian Rockies, national railroads, R.C.M.P.

e) develop commentary notes:

- tailor commentary to passengers
- use format that encourages 'telling' not 'reading,' e.g. point form

C.  
COMMUNICATION



SKILL 2:  
PREPARE AND  
DELIVER  
COMMENTARY

## 2.1 cont'd

- f) supplement commentary with:
  - filler material, e.g. photographs, props, human interest stories, games
  - amusing anecdotes about area to be visited
- g) practise and revise commentary as necessary
- h) keep information current

**P** develop commentary as outlined

## 2.2 identify importance of tailoring commentary to passengers

**K** identify importance of tailoring commentary to passengers:

- a) generates enthusiasm
- b) enhances enjoyment
- c) accommodates special interests
- d) establishes credibility for self and commentary
- e) creates and maintains passengers' interest

## 2.3 tailor commentary to passengers

**K** outline how to tailor commentary to passengers:

- a) determine passengers' profile, e.g. where they live, occupations, interests, reasons for taking tour
- b) determine passengers' needs, e.g. preferences for metric versus imperial standard of measurement
- c) link commentary to passengers' profile and needs
- d) be a good listener
- e) respond to passengers' body language, e.g. adjust commentary if passengers appear bored

C.  
COMMUNICATION

## TOUR DIRECTOR

### SKILL 2: PREPARE AND DELIVER COMMENTARY

2.3 cont'd

- f) address passengers by name, if possible:
- refer to passengers by appropriate title, e.g. 'Mr' or 'Mrs,' unless otherwise directed

**P** tailor commentary to passengers as outlined

2.4 outline importance of using public address system effectively

**K** outline importance of using public address system effectively:

public address system is a critical link for communicating tour commentary and information to passengers

2.5 use communication systems

**K** outline how to use communication systems:

- familiarize self with communication systems on coach, e.g. ask driver about use and care of public address system, video player, radio and cassette player
- take care of equipment, for example:
  - replace microphone to holder at stops
  - return tapes to cases when not in use
  - turn communication systems off when not in use
- when using microphone:
  - take sanitary precautions, e.g. do not let microphone contact mouth

---

### C. COMMUNICATION

SKILL 2:  
PREPARE AND  
DELIVER  
COMMENTARY

2.5 cont'd

- ensure cord does not pose safety hazard, e.g. do not dangle cord in aisle
- d) test systems before use, e.g. talk into microphone, play tape
- e) ensure all passengers can hear sound:
  - adjust volume as necessary
- f) ensure video is visible:
  - adjust picture and equipment as necessary
- g) use discretion when allowing passengers to use microphone, e.g. find out what they want to say and ensure it is appropriate before allowing use

P use communication systems as outlined

2.6 deliver commentary

- K outline how to deliver commentary:
- a) communicate clearly
  - b) use variety in words and phrases:
    - use local, colourful language in appropriate manner and ensure explanation is provided, for example:
      - 'salt chuck' means 'ocean' in British Columbia
      - 'sourdough' means 'old-timer' in far north of Canada
  - c) involve all senses in descriptions, e.g. note temperature, colour, scents
  - d) face group, if possible:
    - remember to reverse directions, e.g. your right is passengers' left
  - e) ensure own safety, e.g. brace yourself if standing when giving commentary on moving coach

C.  
COMMUNICATION

## TOUR DIRECTOR

### SKILL 2: PREPARE AND DELIVER COMMENTARY

#### 2.6 cont'd

- f) focus attention on entire group, e.g. do not leave out passengers in back of group, do not focus on any particular passenger
- g) use notes for reference:
  - do not read commentary directly from notes
- h) involve passengers, e.g. ask questions, allow comments, use passengers with tour-related expertise to supplement commentary:
  - acknowledge contributions
- i) admit mistakes or errors in commentary
- j) if working with a translator:
  - keep commentary simple and brief
  - pause in appropriate places to allow for translation
  - allow sufficient time for translation to take place before resuming commentary
  - begin commentary sufficiently ahead of time so that translation heard corresponds to subject being highlighted
- k) if delivering multi-lingual tour:
  - balance delivery among languages, e.g. vary amount of time spent speaking each language
  - alternate language used first when delivering commentary
  - allow sufficient lead time to deliver commentary in all languages so that commentary corresponds to subject being highlighted

---

### C. COMMUNICATION



SKILL 2:  
PREPARE AND  
DELIVER  
COMMENTARY

2.6 cont'd

- l) explain:
  - acronyms, e.g. GST means 'Goods and Services Tax'
  - local terminology, e.g. elevator means 'lift'
- m) turn negative circumstances into positive, if possible, e.g. rain makes Butchart Gardens even more beautiful
- n) use variety of content to balance commentary, e.g. humour, legends, history, statistics, questions:
  - keep topic light and brief to maintain interest of group, i.e. avoid too much detail
- o) use supplementary material, e.g. video tapes, audio cassettes
- p) ad lib, e.g. spontaneously inject current situations into commentary
- q) anticipate lead time to deliver commentary, e.g. give commentary in advance of situations where microphone is unavailable
- r) pause, rather than shout, when sounds are too loud to talk over
- s) allow for quiet time, considering needs and wishes of passengers, e.g. to chat, ask questions, enjoy site, rest
- t) allow opportunities for feedback, e.g. questions, comments
- u) do not:
  - use:
    - slang or profanity
    - overused phrases, e.g. you guys, stuff, believe it or not, but, eh, um, uh
  - express negative opinions, criticize others or impose own ideas or biases on passengers, e.g. about politics, competitors, community, race/nationalities, religion
  - instill fear
  - exaggerate

---

C.  
COMMUNICATION

## TOUR DIRECTOR

SKILL 2:  
PREPARE AND  
DELIVER  
COMMENTARY

2.6 cont'd

- be argumentative
  - talk about personal issues
  - overuse statistics
  - chew gum
- v) save some commentary for return trip if retracing route

**P** deliver commentary as outlined

---

C.  
COMMUNICATION

SKILL 1:  
PREPARE FOR  
TOUR

1.1 prepare for tour

K

outline how to prepare for tour:

- a) obtain tour information from tour operator, for example:
  - theme
  - itinerary
  - inclusions, e.g. meals, activities
  - routing
  - timing
  - passengers' profile
- b) review route and itinerary:
  - make changes as necessary:
    - confirm changes with tour operator
- c) confirm, with tour operator, which reservations have been made and those which must be made, for example:
  - coach
  - hotels
  - attractions
  - services, e.g. step-on guides
  - meal stops, e.g. group meals, daily stops
  - alternate transportation, e.g. airplanes, trains, ferries
- d) make reservations as required
- e) develop commentary
- f) review company policies regarding, for example:
  - dress requirements for tour, e.g. uniform, name tag, jeans
  - personal expenses covered, e.g. telephone calls, meals
  - acceptance of tips and commissions
  - level of authority for incurring extra expenses
  - level of authority to make substitutions or additions during tour
  - handling of tour float

D.  
PROCEDURES

## SKILL 1: PREPARE FOR TOUR

### 1.1 cont'd

- wages, e.g. payment method, advances, date of payment
- emergency procedures
- authorization to sell add-on tours or attractions
- spouses and relatives travelling on tour
- reporting procedures, e.g. determine circumstances when written or verbal reports are required, including level of detail and frequency required
- procedure to follow in event of insurance claim on tour
- g) gather necessary information and documentation for tour, for example:
  - passenger information, e.g. manifests, pick-up times and places
  - reservation confirmations for, for example:
    - hotels
    - attractions
    - meals
    - step-on guides
    - coaches
    - alternate transportation
  - list of contact numbers and names, e.g. restaurants, hotels, consulates, medical facilities
- h) re-confirm passenger manifest
- i) re-confirm reservations and arrangements
- j) obtain tour finances, e.g. float, tour expense cheques

## D. PROCEDURES



## SKILL 1: PREPARE FOR TOUR

### 1.1 cont'd

- k) obtain tour reporting forms, for example:
  - daily expense forms
  - receipt books
  - accident reports
  - log book
  - passenger incident report form
- l) determine visa and passport requirements for each country entering on tour, e.g. refer to Travel Information Manual
- m) obtain and check 'on-the-road' supplies, for example:
  - comment forms
  - baggage and name tags
  - entertainment, e.g. games, prizes, song sheets, tapes, magazines
  - refreshments, e.g. water, snacks
  - promotional materials, e.g. brochures, personal travel bags
  - stationary, e.g. pens, paper
  - maps
  - first aid kit
  - customs forms, e.g. immigration, personal declarations
  - duty free forms
  - tax rebate forms

**P** prepare for tour as outlined

---

D.  
PROCEDURES

## TOUR DIRECTOR

### SKILL 2: CONDUCT TOUR

2.1 meet ground  
passengers

**K** outline how to meet ground passengers:

- a) arrive at pick-up point at specified time
- b) greet passengers:
  - introduce self
- c) check baggage:
  - distribute baggage tags, if necessary
  - ensure baggage is stowed
- d) ask passengers to board coach:
  - assign seating if necessary, e.g. ask solitary travellers to share paired seats
- e) verify passenger manifest by name and number
- f) introduce self and driver to passengers
- g) provide information to passengers, for example:
  - coach number and distinguishing features of coach
  - method of seat rotation to be used
  - activities for the day

**P** meet ground passengers as outlined

2.2 meet incoming airline  
passengers

**K** outline how to meet incoming airline passengers:

- a) confirm:
  - flight arrival time
  - coach
  - coach number
  - driver's name
- b) meet driver and locate coach:
  - reserve tour director's seat
- c) arrange porter service to assist with baggage, if available

#### D. PROCEDURES

SKILL 2:  
CONDUCT  
TOUR

## 2.2 cont'd

- d) proceed to arrival area,  
e.g. international reception area:
  - clear security, if necessary
- e) greet disembarking passengers,  
e.g. carry sign with name of tour or tour  
company on it
- f) assemble passengers in one area:
  - compare names of passengers to  
tour manifest:
    - if missing passenger:
      - ▲ ask if anyone has seen or was  
travelling with missing  
passenger
      - ▲ check with transportation  
counter to ensure passenger  
was on flight
      - ▲ page passenger in terminal
- g) collect and verify passengers' baggage:
  - distribute baggage tags
  - if missing baggage:
    - attempt to locate
    - assist passenger in filing claim  
form, if required:
      - ▲ give itinerary and addresses  
to agent for forwarding lost  
baggage
  - if baggage is damaged, assist  
passenger in filing claim form
- h) count baggage
- i) arrange transfer of baggage to coach,  
for example:
  - instruct passengers to take baggage  
to coach
  - have porter assist with baggage
- j) direct passengers to coach
- k) re-check passenger manifest to ensure  
all passengers are on coach

P

meet incoming airline passengers as  
outlined

---

D.  
PROCEDURES

## TOUR DIRECTOR

### SKILL 2: CONDUCT TOUR

2.3 transfer passengers to  
hotel

- K** outline how to transfer passengers to hotel:
- a) ensure name of tour and company is on coach, e.g. place sign in coach window
  - b) re-count baggage
  - c) ask passengers to board coach
  - d) count passengers:
    - compare number of passengers to manifest
  - e) introduce self and driver
  - f) provide information to passengers, for example:
    - coach company name
    - coach number and distinguishing features of coach
    - next-day coach seating arrangements
    - local time
    - details about hotel, for example:
      - location
      - facilities, services and layout, e.g. pool, restaurants, safety deposit boxes
      - payment procedures for incidentals, e.g. mini bar
    - next day's activities
  - g) give brief commentary en route to hotel, if necessary
  - h) collect passports or passport information, if required for hotel check-in

**P** transfer passengers to hotel as outlined

#### D. PROCEDURES



SKILL 2:  
CONDUCT  
TOUR

2.4 check in at hotel

K

outline how to check in at hotel:

- a) upon arrival at hotel, ask passengers to:
  - remain seated until coach has stopped
  - collect personal belongings
  - remain on coach
- b) notify guest services and front desk of arrival
- c) determine location and hours of operation of hotel facilities and services
- d) obtain:
  - hotel rooming list:
    - compare to own and make required changes, e.g. to meet special requests
    - inform front desk and bell staff of changes
  - room keys
  - meal vouchers, if applicable
- e) return to coach:
  - allow hotel representative to welcome passengers and to provide information, if applicable
  - make announcements, for example:
    - details about hotel, e.g. amenities, location of elevators and ice machines
    - meal times and locations
    - payment procedures for incidentals
    - departure information, for example:
      - ▲ time of baggage pull
      - ▲ time of departure
      - ▲ loading location of coach
    - procedure for wake-up calls
    - how to contact tour director, e.g. through hotel switchboard

D.  
PROCEDURES

## TOUR DIRECTOR

### SKILL 2: CONDUCT TOUR

#### 2.4 cont'd

- hand out keys and documents:
  - rotate order of who receives keys and documents first throughout tour
- f) arrange wake-up calls, as required
- g) confirm check-out with front desk
- h) make arrangements for baggage pull with guest services attendant
- i) confirm other arrangements, e.g. time and location of welcome reception
- j) assist guest services attendant with baggage, e.g. offer to help match rooming list to baggage tags
- k) be available in lobby for reasonable period of time to deal with immediate concerns, e.g. misplaced baggage, dissatisfaction with room

**P** check in at hotel as outlined

#### 2.5 check out of hotel

**K** outline how to check out of hotel:

- a) leave ample time for check out, e.g. one hour ahead of scheduled departure
- b) ensure wake-up calls are carried out as requested
- c) confirm baggage pull is carried out as requested
- d) at front desk:
  - settle tour company account:
    - verify tour company charges
    - issue vouchers or cheques
  - ensure passengers have:
    - returned keys

### D. PROCEDURES

SKILL 2:  
CONDUCT  
TOUR

2.5 cont'd

- paid incidental charges:
  - ▲ discuss unpaid incidental charges with passengers in private
- e) verify baggage count
- f) ask passengers to board coach:
  - count passengers
  - ensure passengers follow seat rotation guidelines
  - collect room keys, if necessary
  - ensure passengers have emptied safety deposit boxes and reclaimed passports, if necessary
- g) allow time for hotel representative to make farewell speech, if applicable

**P** check out of hotel as outlined

2.6 conduct first-day  
tour briefing

**K** outline how to conduct first-day tour briefing:

- a) introduce self and driver
- b) set positive tone for tour:
  - provide enthusiastic overview of itinerary
  - make group feel comfortable:
    - explain your role is to:
      - ▲ highlight positive aspects of tour
      - ▲ look after tour and passengers
      - ▲ be available in case of problems or concerns to ensure passengers have best tour possible
- c) outline guidelines for tour, for example:
  - procedures for:
    - wake-up calls
    - baggage handling
    - counting baggage

---

D.  
PROCEDURES

## SKILL 2: CONDUCT TOUR

2.6 cont'd

### D. PROCEDURES

- seat rotation
- disembarkation
- importance of punctuality and implications of non-compliance
- smoking policy
- use of washrooms
- frequency of stops
- d) discuss coach amenities
- e) distribute:
  - comment forms
  - name tags, if applicable:
    - correct, if necessary
- f) outline important local information, for example:
  - which side of road traffic drives on
  - currency
  - credit card use and special billing procedures, if applicable
  - relevant tax rebate programs
  - plumbing and electrical information, e.g. type of facilities and manner of operation
  - banking, e.g. hours, days, procedures
  - safety of water supply
- g) outline tipping customs of country:
  - explain when tip will be included in cost of tour package, e.g. hotel portorage, step-on guides, meals
  - recommend standard amount of tip for different types of service, if applicable:
    - indicate that passengers are welcome to give more if service warrants it
- h) outline guidelines for responsible tourism



SKILL 2:  
CONDUCT  
TOUR

## 2.6 cont'd

- i) ask passengers to:
  - complete confidential medical forms, if applicable
  - sign liability waivers, if required
  - identify medical concerns and dietary restrictions
- j) remind passengers to retain receipts for tax rebates or customs purposes, if required
- k) outline safety information and emergency procedures, for example:
  - indicate illness as soon as possible
  - stow carry-on baggage safely
  - use caution when climbing stairs and moving in coach
  - remain seated while coach is moving
  - stay with group during tour activities:
    - inform tour director when leaving group
  - while on own:
    - remove name tags
    - travel in pairs or groups
    - stay in tourist areas
    - carry wallets in front pockets; carry purses under arm
  - carry:
    - passports and money with you, not in suitcase
    - medication, itinerary, local maps and hotel card with you at all times
- l) inform passengers about company policy regarding administration of emergency medical aid

**P** conduct first-day tour briefing as outlined

---

D.  
PROCEDURES

## SKILL 2: CONDUCT TOUR

2.7 conduct site briefing

**K**

outline how to conduct site briefing:

- a) inform passengers, before disembarking coach, of:
  - reason for stop, e.g. meal, attraction, scenic view
  - length of stop
  - procedure to follow at stop
  - time of departure:
    - be specific, e.g. say, 'return at 10:30 - it is now 10:15'
  - location of coach at departure time
- b) ask passengers to remain on coach until arrangements are completed, e.g. purchase tickets, determine seating area, meet site guide
- c) return to coach and give instructions to passengers, e.g. distribute tickets, provide directions to seating area and washrooms
- d) ensure passengers disembark safely:
  - advise passengers of hazards
- e) if passengers do not wish to participate in activity, make alternate arrangements, for example:
  - allow passengers to remain on coach
  - allow passengers free time, making them aware of departure time and place
- f) meet group at scheduled place and time
- g) ensure all passengers are present
- h) resume trip

**P**

conduct site briefing as outlined

D.  
PROCEDURES

SKILL 2:  
CONDUCT  
TOUR

2.8 follow guidelines for  
day-to-day tour  
management

- K** outline guidelines for day-to-day tour management:
- a) deliver commentary and filler material
  - b) visit with individual passengers
  - c) conduct activities, for example:
    - play music and/or videos that are:
      - appropriate to group and area
      - at appropriate volume
    - lead games
    - circulate reading materials
    - familiarize passengers with current location on road map
  - d) sell optionals and additions
  - e) determine menu choices for included meals
  - f) hand out treats, if applicable, e.g. candy
  - g) orient passengers to area around destination by pointing out local facilities and services, e.g. laundromat, drug store, liquor store

**P** follow guidelines for day-to-day tour management as outlined

2.9 sell optionals

- K** outline how to sell optionals:
- a) sell only those optionals endorsed by tour company
  - b) hand out booking forms
  - c) explain:
    - each optional available, e.g. benefits, value
    - that cost of optional is not included in tour package price
    - that optionals are permitted only if itinerary allows
    - cancellation policy

D.  
PROCEDURES

## TOUR DIRECTOR

### SKILL 2: CONDUCT TOUR

2.9 cont'd

- method of payment accepted, e.g. credit card, traveller's cheques
- d) allow time for passengers to make decision:
  - give deadline
- e) collect booking forms and payments
- f) process payments:
  - provide receipt, e.g. duplicate booking form, credit card receipt
  - give change, if applicable
- g) ensure adequate lead time for supplier to make arrangements

**P** sell optionals as outlined

2.10 reconfirm reservations

**K** outline how to reconfirm reservations:

- a) identify types of reservations to reconfirm, e.g. hotel, restaurant, attractions, airline
- b) review details of reservation, e.g. number of passengers, number of rooms, special requirements, estimated time of arrival and departure
- c) contact supplier to reconfirm details of reservation and obtain additional information:
  - attempt to reconfirm reservations during normal business hours
  - use most cost-effective method to reconfirm, e.g. 1-800 number, calling card

#### D. PROCEDURES



SKILL 2:  
CONDUCT  
TOUR

2.10 cont'd

- give supplier sufficient advance time, e.g. 12-24 hours in advance for hotels and included meals, 3-4 hours in advance for non-included meals
- d) record:
  - time and date of confirmation
  - name of contact person

**P** reconfirm reservations as outlined

2.11 follow last day procedures

- K** outline last day procedures:
- a) collect comment cards
  - b) distribute customs forms, if applicable
  - c) highlight future tours, e.g. hand out literature
  - d) outline pertinent information, e.g. baggage pull procedures, departure times, customs requirements
  - e) collect or remind passengers about departure taxes, if applicable
  - f) thank passengers
  - g) wish passengers a pleasant trip
  - h) when receiving a tip, thank passenger
  - i) do not solicit tips

**P** follow last day procedures as outlined

---

D.  
PROCEDURES

## TOUR DIRECTOR

### SKILL 2: CONDUCT TOUR

2.12 handle international  
border crossings

- |          |  |
|----------|--|
| <b>K</b> | <p>outline how to handle international border crossings:</p> <ul style="list-style-type: none"> <li>a) obtain current forms and information from customs and immigration authorities</li> <li>b) hand out forms to passengers, if applicable: <ul style="list-style-type: none"> <li>• explain personal exemptions</li> </ul> </li> <li>c) advise passengers: <ul style="list-style-type: none"> <li>• of boarder crossing procedures</li> <li>• to have identification, forms and receipts ready prior to crossing</li> <li>• to adhere to customs and immigration laws and that there may be serious penalties for breaking the law</li> <li>• to speak only when spoken to by officials</li> </ul> </li> <li>d) have information available prior to arrival at border crossing, for example: <ul style="list-style-type: none"> <li>• declarations</li> <li>• itinerary, including dates of departure and return</li> <li>• hotel address list</li> <li>• citizenship of passengers</li> <li>• number of passengers and crew</li> <li>• passenger and crew address list</li> </ul> </li> <li>e) give information to border officials as required</li> </ul> |
| <b>P</b> | <p>handle international border crossings as outlined</p>   |

### D. PROCEDURES

SKILL 2:  
CONDUCT  
TOUR

2.13 check in at  
transportation  
terminals

- K** outline how to check in at transportation terminals:
- a) ensure passengers have required documentation available for journey and destination, e.g. passports, visas, customs declarations
  - b) at airport:
    - leave ample time for check in, in order to minimize chances for disruption, e.g. bumping
    - determine airline and airport procedures for group check in, for example:
      - collect airline tickets from passengers in advance:
        - ▲ arrange in alphabetical order
        - ▲ identify specific requests, e.g. smoking, seat preference
      - arrange for baggage to be transported to group check-in counter
      - take tickets to group check-in counter:
        - ▲ obtain boarding passes and baggage ticket stubs
        - ▲ ensure counter agent tags baggage correctly
      - give passengers boarding passes, ticket stubs and baggage claim checks
      - indicate meeting time and gate number
    - determine airline and airport procedures for individual check in, for example:
      - ask driver to assemble baggage on sidewalk:
        - ▲ use porter, if available
      - determine location of group check-in counter

---

D.  
PROCEDURES

## SKILL 2: CONDUCT TOUR

### 2.13 cont'd

- ask passengers to proceed to group check-in counter with baggage:
  - ▲ indicate that each passenger checks in individually
  - monitor check-in procedures:
    - ▲ be available to help, if necessary
- c) at cruise line, for example:
  - count baggage and confirm baggage is properly tagged prior to arrival at cruise line terminal
  - monitor baggage transfer
  - have passengers proceed to check-in counter
- d) for overnight ferries, for example:
  - ask passengers to remain on coach:
    - obtain state room keys from purser's office or ground office
  - return to coach
  - distribute state room keys
  - confirm with passengers that baggage remains on coach with exception of overnight bags
  - if coach is not travelling with group, arrange baggage pull and transfer
  - board ferry as directed
- e) at railway, for example:
  - inform passengers of:
    - identification symbols on railway cars, e.g. colour coding for different classes
    - platform departure number
    - boarding and departure times

## D. PROCEDURES



SKILL 2:  
CONDUCT  
TOUR

2.13 cont'd

**P** check in at transportation terminals as outlined

- baggage procedures,  
e.g. large pieces checked,  
passengers retain carry-on  
baggage
- distribute tickets to passengers
- monitor boarding procedure

---

D.  
PROCEDURES

## TOUR DIRECTOR

### SKILL 3: MANAGE DETAILS OF TOUR

#### 3.1 adhere to itinerary

- K** outline how to adhere to itinerary:
- a) ensure passengers have itinerary
  - b) review time required to travel between scheduled stops, especially in new areas, and consider:
    - local variations, e.g. weather, traffic, construction
    - time required for loading and unloading coach
  - c) orient guests to itinerary at beginning of each day:
    - outline activities and times in detail
    - note any changes from previous discussions with passengers
    - identify critical times, for example:
      - meal stops
      - flight and ferry departure times
      - special events
  - d) reinforce passengers' responsibility for adhering to schedule
  - e) shorten or lengthen stops as required
  - f) explain next day's itinerary at end of day
  - g) provide itinerary updates to passengers as required
  - h) advise suppliers of delayed arrival or changes in itinerary as soon as known
- P** adhere to itinerary as outlined

#### D. PROCEDURES

SKILL 3:  
MANAGE DETAILS  
OF TOUR

3.2 use seat rotation

K

outline how to use seat rotation:

- a) determine seats to be reserved for tour director or special needs guests, if necessary
- b) explain purpose of and seat rotation method to be used:
  - do not promise front seat to any passenger
  - give reason if any seat is excluded from seat rotation
- c) be consistent, e.g. use same method throughout trip
- d) vary frequency of rotation depending on, for example:
  - size of group
  - length of tour
- e) on multilingual tours, consider keeping same language groups together

P

use seat rotation as outlined

3.3 keep track of  
baggage

K

outline how to keep track of baggage:

- a) determine number of bags at start of tour:
  - advise passengers of company policy regarding excess baggage
- b) ensure baggage is correctly tagged, e.g. with passenger and tour identification
- c) inform driver of baggage count at beginning of tour
- d) inform passengers:
  - that tour director must be contacted to add or remove baggage from inventory
  - of times for baggage pulls
  - not to put out baggage early as it may be pulled for another tour group

---

D.  
PROCEDURES

## TOUR DIRECTOR

### SKILL 3: MANAGE DETAILS OF TOUR

#### 3.3 cont'd

- that carry-on baggage is their responsibility
- e) when stowing baggage on coach, ensure:
  - number of bags is correct
  - baggage counted belongs to your tour group, e.g. when travelling with other coaches, use coloured tags to identify each group's baggage
- f) give baggage count to guest services attendant upon arrival at hotel
- g) make note of damaged baggage:
  - bring damage to owner's attention

**P** keep track of baggage as outlined

#### 3.4 keep track of passengers

**K** outline how to keep track of passengers:

- a) determine number of passengers at beginning of trip:
  - cross reference tour manifest with passenger count
- b) use consistent procedure for counting passengers throughout trip, e.g. count as passengers board coach or once they are seated
- c) ensure that passengers counted belong to your tour group, i.e. not with another group with same company
- d) count passengers frequently, for example:
  - after passengers board coach
  - before boarding airplanes or ferries

## D. PROCEDURES



SKILL 3:  
 MANAGE DETAILS  
 OF TOUR

3.4 cont'd

e) ensure passengers understand exactly where and when to meet before group disperses, e.g. for scatter lunches

**P** keep track of passengers as outlined

3.5 describe importance of welcome and farewell gatherings

**K** describe importance of welcome and farewell gatherings:

- a) welcome gatherings can be used for:
- creating cohesion in group
  - enhancing tour director's rapport with group
  - providing orientation to tour
  - overcoming initial shyness or hesitancy among passengers
  - introducing passengers to each other
  - distributing name tags
  - establishing tone and expectations of tour
- b) farewell gatherings can be used for:
- sharing last evening of group fellowship
  - reminiscing about tour
  - exchanging names and addresses
  - showing photos and videos
  - promoting future tours
  - saying good-byes

---

D.  
PROCEDURES

## TOUR DIRECTOR

### SKILL 3: MANAGE DETAILS OF TOUR

3.6 recognize special days  
or events

**K**

outline how to recognize special days or events:

- a) determine special days or events on tour by:
  - reviewing passenger profile, e.g. identify birthdays, anniversaries
  - reviewing calendar, e.g. note special holidays
  - checking with representatives at destinations to identify local holidays
- b) use discretion when communicating personal information to group, e.g. anniversaries, birthdays
- c) incorporate special days or events into itinerary or commentary, for example:
  - inform group of birthdays and anniversaries
  - arrange for traditional food or decorations, e.g. turkey at Thanksgiving, pumpkin at hallowe'en, birthday cakes
  - announce outcomes of major sporting events during commentary

**P**

recognize special days or events as outlined

3.7 follow cash control and  
reporting procedures

**K**

outline how to follow cash control and reporting procedures:

- a) keep daily log, for example:
  - identify facilities and attractions that may be of future use to tour company:
    - include contact names, if possible

#### D. PROCEDURES

SKILL 3:  
MANAGE DETAILS  
OF TOUR

## 3.7 cont'd

- record any problems and highlights encountered on trip, e.g. with hotels, meals or drivers
- b) track expenses, e.g. telephone calls, taxicab fares, miscellaneous gratuities:
  - keep receipts of cash payments and credit card transactions
  - use company expense claim forms, where applicable:
    - complete forms daily
    - reconcile daily expenses with cash on hand
  - keep business and personal expenses separate
- c) when receiving payments from passengers:
  - for cash, issue receipts
  - for credit cards:
    - call for approval number from credit card company
    - return slips to passengers after approval is obtained
- d) make deposits at banks as determined by tour operator
- e) ask for receipt when paying cash to suppliers, e.g. tips, departure taxes
- f) for traveller's cheques:
  - record cheque serial numbers as they are cashed
  - keep record of cheque serial numbers separate from cheques
- g) for foreign currency:
  - keep different currencies separate
  - familiarize self with currency exchange rates
- h) submit daily log, expense vouchers and invoices to tour operator at end of tour

**P** follow cash control and reporting procedures as outlined

---

D.  
PROCEDURES

## SKILL 1: MANAGE DIFFICULT SITUATIONS

1.1 follow safety and  
security guidelines

**K** outline how to follow safety and security  
guidelines:

- a) keep passenger manifest secure at all times:
  - provide to hotel staff only as required
- b) take safety precautions and request passengers do the same, for example:
  - avoid:
    - serving or drinking hot drinks on moving coach
    - wearing expensive jewellery
    - standing in moving coach
    - divulging personal information to strangers
  - identify emergency exits
  - familiarize self with hotel fire procedures
  - wear footwear appropriate for walking
  - watch for traffic when disembarking from coach
  - travel in pairs or small groups
  - stay in safe areas, e.g. well-lit areas, away from high crime areas
  - secure valuables in hotel safe or other secure area
  - be aware of traffic regulations, e.g. lights, which side of road cars drive on
- c) if in foreign country during political unrest, natural catastrophe or other similar emergency:
  - contact appropriate consulates:
    - provide tour manifest
    - ask for instructions

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E.  
DIFFICULT  
SITUATIONS



SKILL 1:  
MANAGE DIFFICULT  
SITUATIONS

1.1 cont'd

- contact airlines for flight information, e.g. special charters out of country, suspension of flights

**P** follow safety and security guidelines as outlined

1.2 respond to passengers with special needs

**K** outline how to respond to passengers with special needs:

- a) determine passengers' special needs:
  - refer to medical forms
  - ask tour operator
  - ask passenger first rather than travelling companion
- b) ask if assistance is needed; do not assume it is needed
- c) ask for assistance from others if unable to provide assistance yourself
- d) inform passengers of potential problems before departing, for example:
  - high altitude passes
  - rugged terrain or icy conditions
  - inaccessible bathroom facilities
- e) monitor energy level of passengers
- f) alert suppliers of special needs, e.g. physical, dietary
- g) accommodate passengers with special needs, for example:
  - for diabetics:
    - inform them of meal stop times so they can manage blood sugar levels
    - explain limitations of transporting food across some international borders
  - for children:
    - offer special attention, e.g. at photo stop, take child to see squirrel

E.  
DIFFICULT  
SITUATIONS

## TOUR DIRECTOR

### SKILL 1: MANAGE DIFFICULT SITUATIONS

#### 1.2 cont'd

- for elderly passengers:
  - provide additional time for boarding and disembarking
- for visually-impaired guests:
  - offer arm when walking if guest is not accompanied
- for hearing-impaired guests:
  - stand in line of vision when speaking
  - speak slowly, clearly and hold microphone to side of mouth to accommodate lip readers
  - use hand signals and gestures
  - offer pen and paper to aid in communication
- for non-English speaking passengers:
  - use sign language
  - draw pictures

**P** respond to passengers with special needs as outlined

#### 1.3 solve problems

**K** outline how to solve problems:

- a) address problems as soon as possible, e.g. do not wait for a number of complaints before taking action
- b) clarify nature of problem
- c) determine level of authority to deal with problem:
  - try to resolve problem yourself
  - contact tour operator as required

E.  
DIFFICULT  
SITUATIONS

SKILL 1:  
MANAGE DIFFICULT  
SITUATIONS

1.3 cont'd

- d) identify possible solutions, considering:
  - consequences
  - company policies, e.g. regarding refunds
- e) record problems and solutions
- f) make suppliers aware of problems so changes can be made

**P** solve problems as outlined

1.4 locate missing passenger

**K** outline how to locate missing passenger:

- a) ask other passengers where and when missing passenger was last seen:
  - obtain description of passenger, including clothing worn
- b) ask other passengers to remain together
- c) check area where missing passenger was last seen:
  - do not leave group for extended period of time
  - provide description of missing passenger to local staff and ask for assistance
- d) if unable to locate missing passenger, assess implications of leaving without passenger:
  - never leave wilderness area without passenger
- e) if leaving area without missing passenger:
  - contact tour operator
  - provide itinerary to local staff, including contact information and upcoming stops
  - at each stop, call contact where passenger went missing to determine if passenger has been located

E.  
DIFFICULT  
SITUATIONS

## TOUR DIRECTOR

### SKILL 1: MANAGE DIFFICULT SITUATIONS

1.4 cont'd

- if passenger may be in danger, e.g. in area with hazardous terrain, cold nightfall approaching:
  - inform local authorities, e.g. police, park wardens
- f) document problem and action taken:
  - if needed, secure witnesses and ask them to sign statement

**P** locate missing passenger as outlined

1.5 handle disruptive passenger

**K** outline how to handle disruptive passenger:

- a) ensure all passengers are aware of company policies, e.g. smoking restrictions, seat rotation, punctuality
- b) if undesirable behaviour occurs:
  - address disruptive passenger discreetly and as soon as possible
  - address behaviour, not personality
  - restate company policies
  - explain consequences of non-compliance
- c) if undesirable behaviour continues:
  - repeat request to discontinue behaviour
  - follow up as required, e.g. ask passenger to leave tour
  - inform tour operator of situation:
    - discuss anticipated course of action
- d) document problem and action taken:
  - if needed, secure witnesses and ask them to sign statement

E.  
DIFFICULT  
SITUATIONS

SKILL 1:  
MANAGE DIFFICULT  
SITUATIONS

1.5 cont'd

**P** handle disruptive passenger as outlined

1.6 handle bumping

**K** outline how to handle bumping:

- a) avoid splitting group whenever possible:
  - if group must be split, have each group accompanied by tour representative, if possible, e.g. tour director, driver
- b) inform passengers affected:
  - try to present situation in favourable manner, e.g. speak positively about alternatives
  - ask supplier representative to explain situation to passengers:
    - arrange for letter of apology to affected passengers, if necessary
- c) negotiate compensation for passengers, e.g. room upgrades, complimentary meals, refund
- d) assist passengers with alternate arrangements, e.g. arrange for transportation to other hotel, outline payment procedures, check for passengers' mail at original property

**P** handle bumping as outlined

1.7 handle complaints

**K** outline how to handle complaints:

- a) do not take complaint personally:
  - avoid becoming defensive
- b) listen to complaint in private, if possible
- c) empathize with passenger
- d) do not patronize passenger
- e) repeat details to confirm understanding

E.  
DIFFICULT  
SITUATIONS



## TOUR DIRECTOR

### SKILL 1: MANAGE DIFFICULT SITUATIONS

#### 1.7 cont'd

- f) determine best course of action:
  - realize not all complaints can be resolved to passenger's satisfaction, e.g. complaints about quality of hotel on economy tour
  - ask passenger for possible solutions to problem
- g) ensure authority to implement solution:
  - if not, contact authority who can, e.g. tour operator
  - never promise refund
- h) implement solution:
  - inform passenger of action to be taken
  - follow up to determine if solution was satisfactory
- i) document details of complaint and resolution

**P** handle complaints as outlined

#### 1.8 assist passenger in locating lost items

**K** outline how to assist passenger in locating lost items:

- a) obtain:
  - description of item
  - date, time and location where item was last seen
- b) determine if item was lost or stolen:
  - if stolen:
    - report to local authorities, e.g. police, hotel security
    - complete necessary paperwork, e.g. insurance claim form

E.  
DIFFICULT  
SITUATIONS

SKILL 1:  
MANAGE DIFFICULT  
SITUATIONS

1.8 cont'd

- if lost:
  - provide item description, last known location of item, tour itinerary and home address of passenger to local contact, e.g. hotel staff
  - call back to enquire whether item was found
  - offer to assist passenger, e.g. if baggage is lost, help passenger to obtain temporary supplies
  - never offer to replace lost items
- c) keep passenger informed of search activities
- d) if lost item is not found:
  - report loss to tour operator

**P** assist passenger in locating lost items as outlined

1.9 assist sick or injured passenger

**K** outline how to assist sick or injured passenger:

- a) determine nature of sickness or injury, considering:
  - severity
  - urgency, e.g. determine if problem must be dealt with immediately
  - passengers affected
- b) remain calm and in control of group:
  - reassure sick or injured passenger
  - ask group to remain calm
  - provide activity to group
- c) deal with problem quickly and professionally, and resume tour:
  - if problem requires delay or change in itinerary, explain situation to group and request patience and understanding

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E.  
DIFFICULT  
SITUATIONS

### SKILL 1: MANAGE DIFFICULT SITUATIONS

#### 1.9 cont'd

#### E. DIFFICULT SITUATIONS

- insist that passenger seek medical treatment if condition adversely affects tour
- do not call doctor on behalf of passenger
- d) never administer medication to passenger
- e) if passenger must leave group for medical attention:
  - accompany passenger, where possible
  - make arrangements for baggage, e.g. ask passenger, take to hospital or keep with tour
  - assist passenger with arrangements, when possible
  - if required, notify:
    - local authorities, e.g. police, consulate
    - tour operator
    - others, e.g. hotel, insurance company
  - advise group as soon as possible and keep them updated about health of passenger
  - never promise refund to passenger
- f) record details, e.g. names of individuals involved, date and time of incident, names of witnesses

**P** assist sick or injured passenger as outlined

SKILL 1:  
MANAGE DIFFICULT  
SITUATIONS

1.10 handle death of  
passenger

- K** outline how to handle death of passenger:
- a) determine if deceased passenger was travelling alone or with companion:
    - offer assistance and condolences to companion
  - b) immediately notify:
    - local authorities, e.g. police, doctor
    - tour operator
    - foreign consulate, if travelling internationally
  - c) if death occurs away from group:
    - inform group as soon as possible:
      - be informative, but brief
  - d) assist companion, if required, with gathering belongings of deceased in presence of witness, for:
    - provision to local authorities, if required by law:
      - ensure belongings are secure
      - obtain record of transaction, including itemized list of belongings
  - e) if deceased passenger was travelling alone, gather and document belongings, in presence of witness, for safekeeping until end of tour
  - f) record details and provide to:
    - local authorities:
      - never admit or infer that death may be result of negligence of tour operator
    - tour operator
  - g) resume tour as soon as possible, for example:
    - have driver take group to next destination
    - contact ground agent to arrange transfer of group
  - h) update passenger and baggage count when reconfirming reservations
- P** handle death of passenger as outlined

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E.  
DIFFICULT  
SITUATIONS





## ▼ GLOSSARY

baggage pull:	gathering of baggage for loading on coach; passengers are told when and where baggage should be ready for loading
bumping:	unexpected relocation of group or individuals, e.g. from one scheduled flight to another, from one hotel to another
comp:	complimentary
optional:	independent side excursion not included in tour cost or itinerary
quiet time:	period on coach with no commentary
tour operator:	a senior management position whose areas of responsibility include planning, development, promotion, administration and implementation of tour products





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